

## Message Text

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73-61

ACTION EB-07

INFO OCT-01 EUR-12 ISO-00 AGR-10 COME-00 TRSE-00 /030 W

----- 043059

R 151501Z MAY 75

FM AMEMBASSY OTTAWA

TO SECSTATE WASHDC 6448

UNCLAS SECTION 1 OF 2 OTTAWA 1824

PASS AGRICULTURE

EO 11652 NA

TAGS EAGR CA

SUBJ QUARTERLY MEAT CABLE

REF CODE NO. 13C

### 1. GNP QUARTERLY REAL GROWTH AT ANNUAL RATES

#### ESTIMATE

QUARTER 1974 1975

1ST 7.1 MINUS 1.5

2ND MINUS0.5

3RD 0.1

4TH MINUS 0.1

### 2. SUPPLY AND DISPOSITION: PORK, MUTTON AND LAMB, POULTRY, (THOUSAND POUNDS).

#### POST

#### REVISED FINAL FORECAST

(A) PORK 1973 1974 1975

STOCKS, JAN. 1 18,803 33,114 23,338

PRODUCTION 1,360,418 1,347,230 1,230,000

IMPORTS 54,131 80,190 110,000

TOTAL SUPPLY 1,433,352 1,460,534 1,363,338

EXPORTS 125,614 92,174 85,000

DOM. DISAPPEARANCE 1,274,624 1,345,022 1,263,338

SOTCKS, DEC. 31 33,114 23,338 15,000

PER CAPITA (LBS.) 57.6 59.9 55.4

(B) MUTTON AND LAMB

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STOCKS, JAN. 1 9,103 7,233 6,787

PRODUCTION 21,893 18,336 16,000  
 IMPORTS 58,410 38,397 35,000  
 TOTAL SUPPLY 89,406 63,966 57,787  
 EXPORTS 156 126 75  
 DOM. DISAPPEARANCE 82,017 57,053 52,712  
 STOCKS, DEC. 31 7,233 6,787 5,000  
 PER CAPITA (LBS.) 3.7 2.5 2.3

## (C) POULTRY

STOCKS, JAN. 1 56,454 75,899 90,110  
 PRODUCTION 1,042,941 1,034,131 975,000  
 IMPORTS 17,572 16,719 18,300  
 TOTAL SUPPLY 1,116,967 1,132,399 1,083,410  
 EXPORTS 4,931 20,488 3,000  
 DOM. DISAPPEARANCE 1,036,137 1,021,801 1,020,410  
 STOCKS, DEC. 31 75,899 90,110 60,000  
 PER CAPITA (LBS.) 46.9 45.4 44.8

## 3. BEEF PRODUCTION

## A) ESTIMATE OF CATTLE NUMBERS ON FARMS (THOUSANDS)

1973 1974 1975 1)  
 JUNE 1 14,134 14,979 15,200  
 DEC. 31 13,210 14,018 14,500

## B) SLAUGHTER (THOUSANDS)

CATTLE 3,412 3,629 4,000  
 CALVES 482 616 850  
 TOTAL 3,894 4,245 4,850

## 1) POST FORECAST

## C) SUPPLY AND DISPOSITION (THOUSAND LBS. CARCASS WEIGHT EQUIVALENT)

REVISED FINAL POSE FORECAST  
 1973 1974 1975  
 STOCKS, JAN 1 50,006 56,729 47,746  
 PRODUCTION - TOTAL 1,976,432 2,076,521 2,210,000  
 - BEEF 1,910,575 1,999,106 2,100,000  
 - VEAL 65,857 77,415 110,000  
 IMPORTS - TOTAL 224,938 180,153 165,000  
 - BONE-IN 25,842 12,059 15,000  
 - BONELESS  
 FRESH 21,876 14,171 10,000  
 FROZEN 147,432 131,278 125,000  
 - OTHER 29,788 22,645 15,000

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TOTAL SUPPLY 2,251,376 2,313,403 2,422,746

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TO SECSTATE WASHDC 6449

UNCLAS SECTION 2 OF 2 OTTAWA 1824

PASS AGRICULTURE

	REVISED	FINAL	POST FORECAST
	1973	1974	1975
EXPORTS - TOTAL	88,204	57,578	30,000
BEEF - BONE-IN	14,036	6,944	4,000
- BONELESS	60,888	41,598	19,000
- CURED	6,526	4,114	4,500
VEAL	2,294	965	100
N.E.S.	4,461	3,957	2,400
DOM. DISAPPEARANCE	2,106,443	2,208,079	2,327,746
STOCKS, DEC. 31	56,729	47,746	65,000
PER CAPITA (LBS.)	95.2	98.2	102.0

#### 4. PRICE FORECASE

(A) WHOLESALE DRESSED MEAT PRICES - SOUTHERN ONTARIO

(A1 STEER CARCASSES/SIDES 500-700 LBS.; CAN CENTS/LB.)

	PRELIMINARY	ESTIMATE
	1974	1975
JANUARY	89.52	86.59
FEBRUARY	88.10	76.12
MARCH	81.97	73.05
APRIL	81.16	72.88
MAY	84.52	77.00
JUNE	86.29	80.00
JULY	90.67	
AUGUST	91.37	
SEPTEMBER	91.42	
OCTOBER	88.09	
NOVEMBER	92.59	
DECEMBER	90.60	

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ANNUAL AVERAGE 88.03

5. QUARTERLY ESTIMATE OF BEEF AND VEAL EXPORTS TO U.S.

(1,000 LBS. PRODUCT WEIGHT)

QUARTER BEEF AND VEAL EXPORTS TO U.S.

	1974	1975
1ST	11,877	1,800
2ND	6,971	1,400
3RD	8,905	3,000&
4TH	8,427	5,500&
TOTAL	36,180	11,700

& BASED ON ASSUMPTION GOC ALLOCATES EXPORTS TO U.S. UNDER U.S. IMPORT QUOTA FOLLOWING AUGUST 12, 1975 (SEE COMMENTS).

COMMENTS:

1. FEDERALLY INSPECTED CATTLE SLAUGHTER JANUARY 1 TO APRIL 26, 1975 UP 15.4 PERCENT FROM SAME PERIOD LAST YEAR. COW AND HEIFER SLAUGHTER DURING FIRST QUARTER 1975 UP 20.6 AND 68.8 PERCENT RESPECTIVELY FROM CORRESPONDING PERIOD YEAR EARLIER AND COMPRISING LARGER PORTION OF TOTAL SLAUGHTER MIX. TOTAL 1975 CATTLE SLAUGHTER EXPECTED TO EXCEED 4 MILLION HEAD. LOWER AVERAGE CARCASS WEIGHTS WILL TEMPER INCREASES IN ACTUAL BEEF OUTPUT.

2. CALF SLAUGHTER FORECAST TO INCREASE MARKEDLY IN 1975. INCREASED CALF INVENTORIES AND REDUCED LIVE EXPORTS TO U.S. DUE TO U.S. QUOTA EXPECTED TO PROVIDE IMPETUS FOR DOMESTIC SLAUGHTER TO REACH 850,000 HEAD.

3. CANADIAN IMPORTS OF PORK DURING 1975, OVER 95 PERCENT FROM U.S. EXPECTED TO EXCEED 100 MILLION POUNDS IF PRESENT LEVELS CONTINUE AND PLACE CANADA IN NET IMPORT POSITION.

4. LARGE DECLINES OF 8 TO 10 PERCENT FROM 1974 LEVEL FORECAST FOR 1975 PORK PRODUCTION. GREATER DECLINES ESTIMATED TO BE TEMPERED BY DECREASED LIVE EXPORTS TO U.S. UNDER U.S. IMPORT QUOTA. SHARPEST REDUCTION IN MARKETINGS EXPECTED IN SUMMER MONTHS AS ACTUAL FARROWINGS IN JANUARY-MARCH PERIOD OFF 16 PERCENT FROM FIRST QUARTER 1974. FARROWING INTENTIONS FOR APRIL-JUNE PIG CROP INDICATE AN 11 PERCENT REDUCTION FROM YEAR EARLIER IS PLANNED FOLLOWED BY A 2 PERCENT CUT IN FARROWING INTENTIONS DURING THE JULY-SEPT. PERIOD OF 1975.

5. ESTIMATE OF BEEF AND VEAL EXPORTS TO U.S. ASSUMES CONTINUATION BY THE U.S. OF BI-LATERAL AUOTA ON IMPORTS OF CANADIAN BEEF AND VEAL AND CONTINUATION BY GOC OF EXPORT ALLOCATIONS. IT IS UNCLASSIFIED

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ENTIRELY POSSIBLE THAT GOC MAY DESIRE TO SEE THEIR CY75 EXPORTS TO THE U.S. REACH THE 17 MILLION POUND LEVEL.  
PORTER

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## Message Attributes

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